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# **Spain**

# Fresh Deciduous Fruit

# **Annual**

2001

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#### **Report Highlights:**

Good weather so far this season should boost Spain's deciduous tree fruit crops, with apple production up 25 percent and pears, up 12 percent. The table grape crop has had problems, however and may drop 10 percent below year-earlier levels. Although Spain is a net exporter of these fruits, there are some opportunities for high quality U.S. apples.

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#### **Executive Summary**

Spain's apple and pear orchards have enjoyed generally favorable weather this season, with only minor damage from hail and frost; consequently, this season's harvests of both crops are estimated to be higher than last year's output, as well as above the average for the last five years. According to producers' organizations, total apple production for 2001/02 is forecast at 875,000 tons, about 25 percent higher than last year's crop. The 2001/02 pear crop is estimated at 665,000 tons, almost 12 percent above the previous year. Although there are no official estimates for the 2001/02 table grape crop, we expect it to be about 320,000 tons, or 10 percent lower than last year. Heavy rains in May caused an irregular blossoming on most vines, as well as high temperatures in July that affected the normal groth of the fruit.

With a larger supply of domestic apples and pears, 2000/01 deciduous fruit imports are expected to fall while exports should increase. Opportunities continue to exist for U.S. apples in Spain. Since Spain is a net pear and table grape exporter, it will provide little market opportunity for U.S. pears or table grapes.

Note: Current exchange rate is:

182 pesetas/\$1.00.

1 ECU = 166.38 Pesetas

1 ECU = \$.90

#### **Production**

#### A. Fresh Apples

Although there were some freezes and hailstorms in the main apple producing areas, the regular development of the apple crop was not significantly hampered. Total 2001/02 table apple production crop is estimated at 874,715 metric tons, about 25 percent above last year's crop. The quality of the crop is expected to be good. Cider apple production is forecast to reach 61,400 tons, a four-fold increase over last year's crop.

About 60 percent of the apple crop is produced in Catalonia and the Ebro river basin. Lerida, the main producing province, accounts for approximately 30 percent of national production. Total area planted to dessert apples (1997 data) is 44,500 hectares (ha), of which 43,400 ha are bearing. Cider apple production is concentrated in Asturias and the Basque Country in Northern Spain. Area planted to cider apples is 7,700 ha. Although the area planted of both types has been declining slightly over the past few years, a rebound may be on the way. During 1999, output apple rootstocks in Catalonia increased by 14 percent to 1.4 million new plants. This may explain the increase in orchard area reported in Catalonia's province of Gerona.

The most popular varieties are bi-color, mainly Galas (30 %) and Golden varieties (28 %). Golden (52.2%), Red Delicious and Starking (10.1%) and Gala (5.6%) are the primary varieties produced and demanded in Spain. Area planted to bi-colored varieties like Gala and Fuji has been increasing, while area planted to Golden and red varieties is decreasing. About half of apple trees planted in Spain are less than 10 years old, while only ten percent are more than 25 years old. About three quarters of the apple crop is produced under irrigation.

Table Apple Production - Spain (Metric Tons)

<b>Autonomous Community</b>	2000	2001 (Forecast)	Percentage
Aragon	124,200	221,100	77.7
Catalonia	393,430	448,425	13.9
Castilla-Leon	4,570	21,040	360.3
La Rioja-Navarra	21,350	27,100	26.9
Murcia	10,700	9,550	-10.7
Other	144,100	147,500	2.3
TOTAL	698,550	874,715	25.2

#### **B.** Fresh Pears

Favorable weather conditions noted above also helped the development of the 2001/02 pear crop. Current marketing year pear crop is estimated at 665,174 metric tons. Fruit quality is reportedly good.

About 70 percent of the pear crop is produced in Northeastern Spain and in the Ebro river basin. Lerida, the main producing province, accounts for approximately 43 percent of national production. Total area planted to pears (1997 data) is 39,000 ha, of which 35,000 ha are bearing. Blanquilla, Conference, Ercolini and Limonera (Jules Guyot) are the most common varieties. Practically all of the pear crop (97.5 percent) is produced under irrigation.

About 47 percent of the pear trees are less than 10 years old, while only 14 percent are 25 years or over. In 1999, a total of 1,299,368 rootstocks were produced in Spain; of this amount, 737,500 units were produced in Catalonia, representing an increase of 19 percent in this region. The main varieties were Conference, Williams and Limonera.

# Pear Production - Spain (Metric Tons)

<b>Autonomous Community</b>	2000	2001 - Forecast	Percentage
Aragon	109,000	152,600	40.0
Catalonia	320,850	350,159	9.1
Rioja-Navarra	43,550	46,500	6.7
Extremadura	29,700	25,215	-15.10
Murcia	28,300	25,500	-9.9
Others	63,300	65,200	3
TOTAL	594,700	665,174	11.8

#### C. Fresh Table Grapes

Heavy rains in May caused an irregular blossoming on most vines, as well as high temperatures in July that affected the normal groth of the fruit. The 2001/02 crop is estimated at 320,000 tons, about ten percent lower than the previous year. About 62 percent of this crop is located in the Valencia region.

#### Consumption

#### A. Fresh Apples

Fresh apple consumption remains relatively stable although official and trade sources indicate that fruit consumption in general is increasing. Fruit is usually consumed as a dessert and must compete with increased consumption of dairy products. Both Spanish and EU authorities continue organizing campaigns to increase apple and citrus consumption. Apples are the third most popular fruit in Spain, after oranges and bananas.

#### **B. Fresh Pears**

Fresh pear consumption is basically stable, with year-to-year fluctuations reflecting domestic production levels and availability. The main varieties consumed are Blanquilla, Ercolini and Conference, with Blanquilla the favorite among consumers. Pears rank sixth among the most consumed fruits in Spain.

#### C. Table Grapes

Consumption of table grapes is forecast to decrease slightly from the previous year due a decrease in production. Moscatel is the most important variety. Table grapes are ninth among fruits consumed in Spain. Seedless grapes are becoming more common, although price is a constraint to expanding demand.

#### Trade

#### A. Fresh Apples

Spanish apple imports are estimated to have increased significantly during marketing year 2000/01, due to the lower domestic production. Data for eleven months of marketing year (July-2000/May-2001) show imports totaled 259,786 tons. Based on that pace, imports for the entire marketing year are estimated at 272,700 tons, about 40 percent above the previous MY. France, Chile, Portugal and Italy were the major suppliers. Apple imports during CY 2000 totaled 247,325 tons, some 14 percent above the previous year. With higher crop expectations for 2001/02, imports should decrease.

Although no direct imports of U.S. apples as are shown in Spanish Customs data for CY 2000, many products often pass customs in other EU countries and are then shipped to Spain. Spain's fruit importers continue to express interest in importing U.S. apples, particularly Red Delicious and Golden varieties. Continued promotional efforts are required to increase Spanish importer and consumer awareness of the quality and of the range of varieties of U.S. apples. The most important period to market U.S. apples in Spain is during November-March, before the Southern Hemisphere crop reaches Spain.

Spanish exports of apples during the first eleven months of MY 2000/01 amounted to 52,123 tons, about equal to the same period of the previous marketing year. Portugal and the Czech Republic were the main destinations. Exports during CY 2000 amounted to 64,906 tons, almost 32 higher than the previous year. Apple exports are forecast to be higher in 2001/02 due to the higher domestic crop.

#### **B.** Fresh Pears

Imports of pears during the first eleven months of MY 2000/01, amounted to 41,506 tons, about 77 percent higher than the same period a year earlier. Imports during CY 2000 totaled 27,034 tons, about 17 percent lower from 1999. The bulk of imports continues to be sourced from other EU countries and Chile. No U.S. pear imports were reported for CY 2000. Imports are expected to decrease in 2001/02 as a result of higher domestic supplies.

Exports during the first eleven months of MY 2000/01 amounted to 89,454 tons, a decrease of 34 percent from the previous year. Major destinations were Italy, Germany and Greece. Total exports during CY 2000 reached 97,596 tons, a 22 percent decrease under the previous CY. In 2001/02, however, exports are forecast to increase slightly due to the higher crop.

#### C. Table Grapes

Imports of table grapes during MY 2000/01 amounted to 19,213 tons, slightly lower than the previous year. Italy and Chile were again the major suppliers. As a result of lower production, imports are forecast to increase in MY 2001/02. Spain is a net table grape exporter, and the harvest of the U.S. table grape crop coincides with the Spanish harvesting period for this product; thus, Spain has little potential as a U.S. table grape market.

Spanish exports of table grapes during MY 2000/01 were 111,143 tons, an 11 percent increase from the previous year. Major markets are other EU countries, mainly Germany, Portugal, France and the United Kingdom. Exports are expected to decrease in MY 2001/02 in line with the forecast for lower domestic supplies.

### **Marketing**

#### A. Fresh Apples

U.S. quality apples have good market opportunities in Spain, as long as they are crispy and well-colored. U.S. Red varieties have the greatest marketing opportunities, followed by Gala, Fuji and Golden. The main constraint to U.S. apple exports to Spain is high price relative to prices from other suppliers. The strong dollar has contributed to this problem. Nevertheless, if a need emerges for Spain to turn to alternative suppliers, U.S. high quality apples will have a niche in the Spanish market. To tap into this potential, suppliers will need to be more aggressive in promoting U.S. apples in Spain, stressing quality and fruit size. Spain's importers and consumers are already aware of the texture and flavor of U.S. apples, but more fruit importers and distributors must be educated about this good quality product.

#### **B.** Fresh Pears

Only in years of reduced crops is Spain a potential market for U.S. pears. EU suppliers are in a better position to supply winter pears due to lower transport costs from other EU countries. Every year Spain also imports more off-season pears from the Southern Hemisphere to provide the market with a continuous supply.

#### C. Table Grapes

Spain is a difficult market for U.S. grapes since it is a major exporter of grapes and has a long growing season concurrent with the U.S. season.

# **PS&D** Table - Fresh Apples

PSD Table						
Country	Spain					
Commodity	Fresh Apples	S			(HA)(1000 TREES)(MT	·")
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	49000	49000	49000	49000	0	49000
Area Harvested	46500	46500	46500	46500	0	46500
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	847000	847000	654000	668500	0	840000
Non-Comm. Production	40000	40000	35000	30000	0	35000
TOTAL Production	887000	887000	689000	698500	0	875000
TOTAL Imports	193800	193800	210000	272700	0	180000
TOTAL SUPPLY	1080800	1080800	899000	971200	0	1055000
Domestic Fresh Consump	795000	795000	675000	725000	0	750000
Exports, Fresh Only	57300	57300	50000	55600	0	70000
For Processing	196000	196000	164000	170000	0	200000
Withdrawal From Market	32500	32500	10000	20600	0	35000
TOTAL UTILIZATION	1080800	1080800	899000	971200	0	1055000

# **Fresh Apples - Imports**

Import Trade			
Matrix			
Country	Spain		
Commodity	Fresh Apples		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1999		2000
U.S.	2480	U.S.	
Others		Others	
France	89862	France	160681
Italy	46965	Chile	19934
Chile	35117	Portugal	13947
Portugal	10798	Italy	11861
Argentina	8699	Czeck Rep.	9902
New Zealand	3036	Belgium	7100
		Germany	5439
		Argentina	2898
		Brazil	2742
		China	3
Total for Others	194477		234507
Others not Listed	19095		12818
Grand Total	216052		247325

# **Fresh Apples - Exports**

Export Trade			
Matrix			
Country	Spain		
Commodity	Fresh Apples		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Portugal	33475	Portugal	19136
Morocco	4709	Czeck Rep.	17839
France	3156	France	10212
Germany	2095	Argentina	2458
Netherlands	1511	Greece	1977
Italy	1083	Brazil	1603
United Kingdom	710	Croatia	1185
		Germany	1027
Total for Others	46739		55437
Others not Listed	2505		9469
Grand Total	49244		64906

### **PS&D Table - Fresh Pears**

PSD Table						
Country	Spain					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT	T)
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	39500	39500	40000	40000	0	40000
Area Harvested	37000	37000	37500	37500	0	37500
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	662500	662500	575000	575000	0	645000
Non-Comm. Production	20000	20000	20000	20000	0	20000
TOTAL Production	682500	682500	595000	595000	0	665000
TOTAL Imports	24500	24500	30000	45500	0	20000
TOTAL SUPPLY	707000	707000	625000	640500	0	685000
Domestic Fresh Consump	499000	499000	470000	480000	0	490000
Exports, Fresh Only	138000	138000	100000	92000	0	130000
For Processing	40000	40000	40000	45000	0	45000
Withdrawal From Market	30000	30000	15000	23500	0	20000
TOTAL UTILIZATION	707000	707000	625000	640500	0	685000

### **Fresh Pears - Imports**

Import Trade			
Matrix			
Country	Spain		
Commodity	Fresh Pears		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Belgium	9761	Belgium	9394
Netherlands	6891	Chile	4868
Chile	6754	Netherlands	4716
Argentina	2273	France	2594
France	1674	Germany	2208
Italy	1456	Italy	836
South Africa	1109	Portugal	726
Total for Others	29918		25342
Others not Listed	2627		1692
Grand Total	32545		27034

### **Fresh Pears - Exports**

E	1		
Export Trade Matrix			
Country	Spain		
Commodity	Fresh Pears		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1999		2000
U.S.	8	U.S.	
Others		Others	
Italy	42255	Italy	26485
Germany	25006	Greece	15042
Greece	15548	Germany	12335
France	12474	France	11627
Portugal	8805	Portugal	9429
United Kingdom	3833	Israel	4060
Netherlands	3178	United Kingdom	3935
		Netherlands	2845
Total for Others	111099		85758
Others not Listed	14015		11838
Grand Total	125122		97596

# ${\bf PS\&D\ Table\ -\ Fresh\ Table\ Grapes}$

PSD Table						
Country	Spain					
Commodity	Fresh Table	Grapes			(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	32000	32000	32000	32000	0	31000
Area Harvested	31000	31000	31000	31000	0	30500
Commercial Production	352200	352200	338600	333000	0	310000
Non-Comm. Production	18000	18000	18000	18000	0	10000
TOTAL Production	370200	370200	356600	351000	0	320000
TOTAL Imports	21000	21000	25000	19200	0	25000
TOTAL SUPPLY	391200	391200	381600	370200	0	345000
Domestic Fresh Consump	255000	255000	255000	236000	0	230000
Exports, Fresh Only	100000	100000	95000	111000	0	95000
For Processing	30000	30000	30000	20000	0	19000
Withdrawal From Market	6200	6200	1600	3200	0	1000
TOTAL UTILIZATION	391200	391200	381600	370200	0	345000

# Fresh Table Grapes - Imports

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Table Grapes		
Time period	CY	Units:	Metric Tons
Imports for:	1999		2000
U.S.	13	U.S.	3
Others		Others	
Italy	11131	Italy	7469
Chile	3759	Chile	4094
South Africa	2845	South Africa	3516
Israel	1280	France	2425
France	897		
Total for Others	19912		17504
Others not Listed	1005		1706
Grand Total	20930		19213

# Fresh Table Grapes - Exports

	I		1
Export Trade			
Matrix			
Country	Spain		
Commodity	Fresh Table		
	Grapes		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	25223	Portugal	28057
Portugal	21395	Germany	26308
France	20510	France	21608
United Kingdom	16580	United Kingdom	17455
Netherlands	4580	Netherlands	5265
Italy	3535	Italy	3973
Total for Others	91823		102666
Others not Listed	8217		8477
Grand Total	100040		111143

### **Concentrated Apple Juice**

PSD Table						
Country	Spain					
Commodity	Concentrate d Apple Juice				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Deliv. To Processors	196000	196000	164000	170000	0	200000
Beginning Stocks	1200	1200	2700	2700	2700	2000
Production	21000	21000	18000	18000	0	21400
Imports	4000	16500	4000	12300	0	10000
TOTAL SUPPLY	26200	38700	24700	33000	2700	33400
Exports	16000	25500	14000	17500	0	17500
Domestic Consumption	7500	10500	8000	13500	0	14000
Ending Stocks	2700	2700	2700	2000	0	1900
TOTAL DISTRIBUTION	26200	38700	24700	33000	0	33400

#### **Production**

As a result of a higher apple crop, MY 2001/02 concentrated apple juice (CAJ) production is forecast at around 21,400 tons. Data shown in the PS&D table are all expressed in terms of 70-71 brix concentrated juice.

# Consumption

Consumption is increasing slightly every year. Consumption of apple based beverages is an estimated 2.6 million liters, representing only 0.4 percent of total beverages consumption in Spain.

#### **Trade**

Spanish CAJ imports during the first eleven months of MY 2000/01 were about 25 percent lower than during the previous marketing year. Most CAJ imports came from Germany and South Africa. Imports are forecast to decrease in MY 2001/02. Imports in CY 2000 were 14,403 tons.

Spanish CAJ exports during the first eleven months of MY 2000/01 (July-00/May-01) were 31 percent lower than the previous marketing year. The United Kingdom and Germany were the major destinations. Exports in MY 2001/02 are expected forecast to be about the same as the previous MY. Total exports during CY 2000 were 21,135 tons.

#### **Concentrated Apple Juice - Imports**

Import Trade			
Matrix			
Country	Spain		
Commodity	Concentrated Apple Juice		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	2345	Germany	4549
Netherlands	1809	South Africa	4162
China	677	Switzerland	2905
Turkey	660	France	1219
Total for Others	5491		12835
Others not Listed	129		1568
Grand Total	5620		14403

# **Concentrated Apple Juice - Exports**

	T	Т	T 1
Export Trade			
Matrix			
Country	Spain		
Commodity	Concentrated		
	Apple Juice		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1999		2000
U.S.	890	U.S.	939
Others		Others	
Germany	9667	United Kingdom	5172
Austria	4066	Germany	4010
United Kingdom	2667	Netherlands	2375
France	1747	France	1531
Japan	1002	Japan	1381
		Italy	1320
		Portugal	1298
Total for Others	19149		17087
Others not Listed	1180		3109
Grand Total	21219		21135